

In the claims:

All of the claims standing for examination are reproduced below for examination.

1-13. (Canceled)

14. (Currently amended) An interactive portfolio-tracking system for enabling online viewing of itemized investment accounts and stock performance entries belonging to a user tracked across disparate on-line accounts and services over the Internet comprising:

a first server node connected to the network, the server node providing a service-access-point for accessing users;

a second server node connected to the network and accessible to the first server node, the second server node providing automated navigation to Web pages providing access to the user's investment accounts, logging in with the user's password and user name, as if the user, periodically accessing the user's financial data held in the accounts, ~~[[and]]~~ manipulating the accounts, as if the user, and aggregating the data for the user; and

a portfolio-tracking software interface installed on the first server node~~[[,]]~~;

wherein the interface is accessible to the user and connected to the network by respective remote nodes, ~~characterized in that~~ and the user, accessing the first server node from the remote nodes ~~interact~~ interacts with the portfolio-tracking interface for the purpose of viewing the user's financial data according to selected category, ~~the data updated periodically through system update and by result of user request~~, the user's portfolio data compiled, ~~[[and]]~~ aggregated by proxy and stored by the second server and the first server accesses the user's financial information and generates reports for the user, using cooperative functions of the first and second server nodes.

15. (Canceled)

16. (Previously presented) The interactive portfolio-tracking system of claim 14, wherein the

first server node is a portal server providing personalized interfaces of the form of hyper-text-markup-language interfaces.

17. (Original) The interactive portfolio-tracking system of claim 16, wherein the on-line accounts and services are accessible over the Internet and are publicly available or subscribed to by the accessing users.

18. (Original) The interactive portfolio-tracking system of claim 17, wherein the remote nodes are personal computers with accessibility to the Internet.

19. (Original) The interactive portfolio-tracking system of claim 17, wherein the remote nodes are cellular telephones with accessibility to Internet.

20. (Original) The interactive portfolio-tracking system of claim 17, wherein the remote nodes are hand-held computers with accessibility to the Internet.

21. (Original) The interactive portfolio-tracking system of claim 17, wherein the second server node stores aggregated data in a connected data repository held externally from the server.

22. (Original) The interactive portfolio-tracking system of claim 21, wherein the portfolio-tracking software interface is linked to at least one secondary interface provided in the form of hyper-text-markup-language, linking achieved through embedded hyperlinking.

23. (Original) The portfolio-tracking system of claim 22, wherein an interactive menu is accessible from within the portfolio-tracking interface, the menu containing a selectable list of online entities maintaining investment accounts, the accounts including IRAs, money market accounts, and retirement accounts.

24. (Original) The portfolio-tracking system of claim 23, wherein a plurality of hyperlinks are embedded in association with individual ones of the account maintaining entities, the hyperlinks,

upon invocation, directing navigation to individual Web-sites hosted by the entities.

25. (Original) The portfolio-tracking system of claim 24, further comprising an interactive link embedded in the main interface to a second interface for viewing a portion of shared stocks as listed in a particular selected account.

26. (Original) The portfolio-tracking system of claim 25, further comprising an interactive link embedded within the main interface of the portfolio-tracking software, the link associated with a secondary interface for viewing updated stock performance data, the data updated by accessing a public entity and the data enhanced with summary data known about the requesting user.

27. (Original) The portfolio-tracking system of claim 26, wherein the enhancements to the data procured from a public entity include the quantity of shares and total value of shares held of a listed stock displayed in the secondary interface.

28. (Currently amended) A method for tracking and viewing a user's financial portfolio data including stock performance data rendered in an interactive user-interface accessible through the Internet comprising the steps of:

- (a) accessing an interactive portfolio-tracking interface on a first server by the user from a remote node connected to the network;

- (b) pre-configuring and selecting accounts and stocks for tracking and viewing, selection ordered by the user through the interface;

- (c) submitting the pre-configured and selected account and stock data, the data used as criteria for service;

- (d) navigating automatically by a second server node to Web sites providing a log-in page to user's to access the user's accounts and stock performance data, logging in with the user's password and user name, as if the user, procuring the user's account and stock performance data as if the user and performing data access, aggregation and storage on behalf of the accessing users; and

- (e) ~~viewing the resulting displays~~ generating reports at the first server by accessing the

stored data at the second server of tracked and rendered aggregated account and stock data and providing the reports to the user via the interface.

29. (Canceled)

30. (Previously presented) The method of claim 28 wherein in step (a), the interactive portfolio-tracking interface is a personalized hyper-text-markup-language interface served by a portal server connected to the network.

31. (Original) The method of claim 30 wherein in step (a), the remote node is a personal computer with accessibility to the network.

32. (Previously presented) The method of claim 28 wherein in step (a), the remote node is a cellular telephone with accessibility to the network.

33. (Previously presented) The method of claim 28 wherein in step (a), the remote node is a hand-held computer with accessibility to the network.